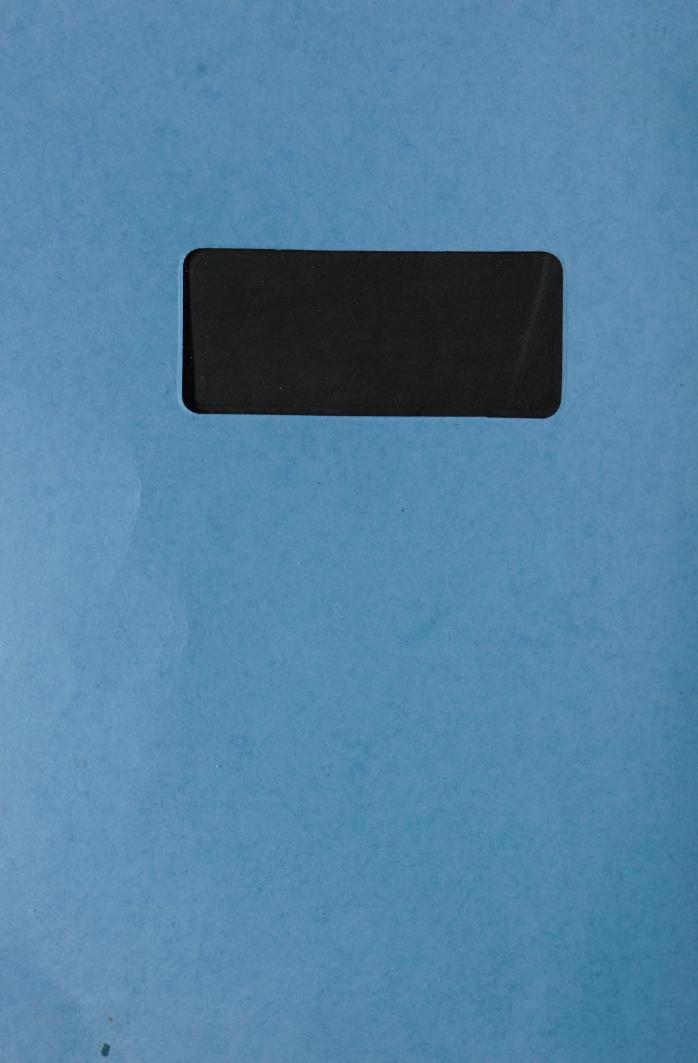


EMERGING SHELTER OPTIONS
FOR THE ELDERLY

- AN ANNOTATED BIBLIOGRAPHY -

CENTRE FOR URBAN & COMMUNITY STUDIES

TORENTO DANADE MSS IA



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Project Planning Branch Ministry of Municipal Affairs and Housing

April, 1982



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EMERGING SHELTER OPTIONS FOR THE ELDERLY

Annotated Bibliography

TABLE OF CONTENTS

			Page
Table of Contents		i	
Refe	rence Source Abbreviations		ii
Intr	oduction		1
1.	SHELTER NEEDS OF THE ELDERLY		3
2.	SHELTER DESIGN FOR THE ELDERLY		11
3.	TYPES OF SHELTER ARRANGEMENTS		17
4.	SHELTER POLICY AND/OR PROGRAM OPTIONS		31
5.	OTHER REFERENCES		39
6.	SOURCES OF INFORMATION		45
7.	GLOSSARY OF TERMS		49

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Reference Sources - Abbreviations

In compiling the annotations for this bibliography, three approaches were used. Existing annotations from other bibliographies and the author's own description of his/her work were included in addition to annotations prepared by Project Planning Branch staff.

The citations are each identified as to its origin, by one of the abbreviations listed below. The abbreviation appears at the end of each citation.

Abbreviation	Source
Author	 author's own abstract, summary, annotation, etc. (or excerpt therefrom).
Corke Bib.	- A Selected, Annotated Bibliography of Canadian Housing Research, 1970 - 1979, S.E. Corke, Bibliographic Series No. 13, Centre for Urban and Community Studies, University of Toronto, June, 1980.
Trans. Bib.	- A Selective Bibliography on Transportation Issues. Working Paper No. 3, Planning for an Aging Society, Transportation Sub-Study, March 1982. University of Toronto/York University, Joint Program in Transportation.
Vance Bib. No. 13	- Architectural Series, <u>Design and Social Planning in Housing for the Elderly</u> , 1975 - 1977. Vance Bibliographies, P.O. Box 229, Monticello, Illinois.
Vance Bib. No. A-31	- Architectural Series, Jan. 1979, Psycho-social Issues Relevant to
	Creating Environments for the Aging, Vance Bibliographies P.O. Box 229, Monticello, Illinois.
Vance Bib. No. 395	- Architectural Series, Dec. 1980, Multigenerational Considerations in Planning Environments for the Elderly, Vance Bibliographies, P.O. Box 229, Monticello, Illinois.

Zeisel Bib.

- Bibliography - Appendix to: Low Rise Housing for Older People - Behavioural Criteria for Design, Zeisel Research, Cambridge, Mass., U.S.A., Sept. 1977. (for HUD, Office of Policy Development and Research).

Where no abbreviation appears, the annotation was prepared by Project Planning Branch Staff.

Introduction

This bibliography provides a selected, annotated guide to a range of recent (post 1975) literature dealing with shelter for the elderly. The word "shelter" is understood to be the term that best encompasses the complex interrelationships involved in housing seniors; the citations in this bibliography cover a wide territory.

Material has been arranged alphabetically, by author or investigator, by five categories: Shelter Needs of the Elderly; Shelter Design for the Elderly; Types of Shelter Arrangements; Shelter Policy and/or Program Options; and, Other References. A Glossary of Terms and list of the sources of information are also included.

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1. SHELTER NEEDS OF THE ELDERLY



1. Shelter Needs of the Elderly

Identifying the shelter needs of the elderly is an integral component in the design and arrangement of housing for the older population. In this section, references dealing with a broad range of factors that are useful in determining elderly needs have been cited. They include: environmental perception, mobility, accessibility, independence, wants and preferences, special needs, and socio-psychological factors.

Andreae, Antonia E. <u>Senior Citizen's Housing Locational Considerations</u> and <u>Social Implications</u>. Major Report No. 14, Centre for Urban and Community Studies, University of Toronto, April 1979.

This paper explores some of the characteristics of the aged that might affect their ability and perhaps even desire to live in certain community settings. An attempt is made to identify specific criteria for measuring the specific locational, accessibility and environmental needs of the elderly. Based on these needs and characteristics, specific residential modifications are suggested that might help in minimizing some of the negative aspects of housing provided for the elderly. The location of senior citizens' housing in Metropolitan Toronto is then examined and it is found that most new buildings are not located in an environment that adequately takes into account the needs of the aged. There is now a widespread feeling that the elderly, because of lifestyle, have spatial and environmental requirements different from those of other age groups. (AUTHOR)

Bednar, Michael, et al. "Planning for Elderly Without Architecture is Like Architecture for the Elderly Without Planning.", <u>Journal of Architectural Education</u>, 31 (Sept. 1977): 41-43.

This article discusses the need for coordinated planning and architectural objectives in designing housing for seniors and improved communications between the two professions through research and education. Several studio and research courses dealing with elderly housing are described. One course had these objectives:

1). to utilize planning data, social science research and environmental research in developing architectural programs and design proposals;

2) to foster an understanding of the aging process with its attendant physiological, social, and psychological ramifications;

3) to gain some understanding of the relationships of the elderly to their physical environments and the design and planning needs which arise from these critical relationships.

Carp. F.M. "Style and Location within the City," Gerontologist, 15 (January 1975): 27-34.

The author confirms the hypothesis that despite obvious drawbacks to center city living for the elderly, advantages outweigh disadvantages. Centrality of residency is associated with a more favorable lifestyle, as defined by the investigator as one paralleling the active aging process. Centrality is positively associated with active, autonomous and satisfying use of time, space and the social network.

Beyond testing the above hypothesis, the article merits consideration in this collection because of its implications on the design of the residential environments for the elderly in urban, rural or suburban settings. The author stresses the importance of specific environmental aspects of "cityness": availability of peer-age neighbors; concentration of health services, stores, cultural activities in a small area; and the accessibility of public transportation and sidewalks.

Carp stresses the need for future research to determine the importance of the above features to specific sub-groups of the elderly population. (Vance Bib. No. A-31)

Gelwicks, L.E., and Newcomer, R.V. <u>Planning Housing Environments for the Elderly</u>. The National Council on Aging, Washington, D.C., 1974.

This book is intended to assist those who "contemplate the development and design of housing for the elderly in a way that best serves the residents' interests, that it helps to focus increased attention on the vast, still unmet housing needs and stimulates action by private, voluntary and public sectors to meet the needs". In the section 'Planning for the Future: Guidelines' the following statement is made on the mobility of the urban and the suburban elderly: "Continuing research in gerontology confirms that older people prefer to remain in their own areas, and specifically within their own neighborhoods, where they have developed a personal support system of friends and relatives over a period of In urban areas, even the highly mobile older person's neighborhood or home range may be as little as six to 10 blocks. With the advent of more facilities, it has become increasingly desirable to localize such services and to provide housing in locations where there is a high density of other older people. Some thorny problems are certainly due to arise with tomorrow's elderly, who may well be stranded in the suburbs. The current generation of elderly, it is true, has been coping with inner city deterioration, yet, those aging in the suburbs may be even worse off. At least in the inner city areas, the older person often has a concentration of facilities within walking distance and the advantages of public transportation. The aging suburbanite faces isolation instead." (AUTHOR) (Trans. Bib.)

Golant, Stephen M. <u>Location and Environment of Elderly Population</u>. University of Chicago, V.H. Winston & Sons, Washington, D.C., 1979.

The unprecedented growth of elderly people in America during the 20th century has been reflected by a burgeoning multi-disciplinary gerontological literature of relevance to academic researchers and planning professionals alike. Nevertheless, insufficient attention has been paid to the nature and significance of residential locations and environments of the elderly. Studies of spatial organization (location) and of man-environment relationships (environment) have been the two persistent themes that characterized geographic thought. This book fills the gap by providing original research investigations and syntheses addressing these themes while illustrating the potential of a geography-gerontology interface.

...(The first part deals with U.S. past and present migration patterns.)...

The second part attempts to define and understand the impact that environments have on older people's behaviour and experiences. Its first chapter argues that the manipulation of the physical environment might be the most effective way to satisfy older people's needs. The two succeeding chapters focus on the ways in which two very different environments - the institution and the neighbourhood - contribute to older people's well-being. The following three (chapters) examine how effectively elderly housing and transportation environments have been manipulated by governmental policies.

In part three the focus is on planning methodologies relevant to both location and environment themes. The first three chapters outline data information systems, models, and analytical tools capable of monitoring and predicting changing residential location patterns. The final chapters describe models capable of assessing whether a place's social welfare environment is adequately fulfilling its occupant's needs. (AUTHOR)

Homenuk, P. Environmental competence amongst independent elderly households. Prepared for Canada Mortgage and Housing Corporation. Toronto, Institute of Environmental Research Inc., February, 1982.

The purpose of this report is to identify factors that influence the elderly household's capacity to continue functioning independently in the community. In the course of this investigation, specific problems of independent elderly households were identified; a measure of environmental competence amongst independent elderly was developed; and recommendations aimed at the needs of independent elderly households and ways of increasing their environmental competence are suggested. (AUTHOR)

Kaill, Robert C. "Housing Canada's Aging." <u>Essence</u>, 4, (February 1980): 79-86.

This study enquires into the preferences of Ontario adults with respect to housing of the aged. The random sample consists of 465 respondents aged 40 and over. Focus is on three major issues in housing older persons - 1.) age segregation, 2.) preservation of privacy and 3.) implications of major re-locations. Findings confirm ambivalence regarding the segregation issue, and the high value placed on privacy in our society. Re-location is generally considered undesirable except when family members reside in other communities. Data analysis suggests an underlying desire to retain control over social activities, rather than have them limited or determined by public policy or administrators. (AUTHOR)

Lawton, M. Powell, Newcomer, Robert J. and Byerts, Thomas O. (Eds.).

Community Planning for an Aging Society - Designing Services and Facilities, Stroudsburg, Pennsylvania: Dowden, Hutchinson and Ross, Inc., 1976.

This book is written for a very wide and multidisciplinary group of individuals who may, at a future time, have a hand in planning environments for older people. The book presents a comprehensive overview of the assets, liabilities, and needs of the elderly, and explores a multitude of issues in the planning of communities, housing, services, and institutions. The contributors - all of whom specialize in gerontology - are acknowledged leaders in the development of theory and research in man-environment relations...the book is topically divided into four sections. Part 1, The Aged Population in a Community Setting, presents basic information about the social, psychological, and biological aspects of aging - a prerequisite to effective planning. Because housing continues to be an important part of matching the aging individual to his environment, it is the major thrust of Part II, Community Planning and Policy Decisions As They Affect Older People, and Part III, Programmatic Aspects of Housing for the Elderly. Community Services for the Elderly, covers other important aspects of planning for the aged, including such topics of interest as subcultural life styles, institutional care, services, transportation, parks, and service planning...The articles also include many illuminating photographs and diagrams, as well as comprehensive sets of references that can be used to facilitate continuing, independent research. (AUTHOR)

Montgomery, James E., Stubbs, Alice C., and Day, Savannah, S. "The Housing Environment of the Rural Elderly.", Gerontologist, 20, (April 1980): 444-451.

This paper examines the housing characteristics and perceptions and steps recently taken (or not taken) to improve the dwellings of 473 non-metropolitan couples 60 years of age or older and of 298 women 60 years of age or older who lived alone. Most of the respondents

owned their dwellings which for the most part were modest and single-family. Usually the respondents said that their housing met needs, but many of them indicated that numerous details needed to be improved. Individually and collectively, federal housing programs were inconsequential to these older rural persons "left behind". (AUTHOR)

Synder, L. and Ostrander, E. <u>Research Basis for Behavioural Program:</u>
<u>The New York State Veterans' Home, Oxford, New York, Ithaca:</u>
Cornell University, 1974.

This study uses empirical research data on the residents and staff of the New York State Veterans' Home to develop a behavioural program for the design of a new facility for the Home. The behavioural program attempts to guide architects in making decisions through a better understanding of the daily lives and interests of institutionalized elderly people. The study covers demographic data, activities, bathing, eating, communication systems, lounges and social areas, preferences for single versus shared rooms, care of personal clothing, use of outdoor areas, use of personal furniture, functions of various departments and service elements, and other topics. (Zeisel Bib.)

Tucker, S.M., M.E. Combs, and A.M. Woolrisk. "Independent Housing for the Elderly: The Human Element in Design," <u>Gerontologist</u>, (January 1975): 73-76.

Although this article deals with planning the arrangement and size of living facilities, the ultimate concern is with individualization to meet the social and physical needs of a mixed elderly population. Housing needs and preferences of one-and two-person households in non-institutional settings are explored by examining life styles of 174 households. Factors determined relevant to planning include: eating patterns, frequency and amount of entertaining (including overnight guests), home maintenance activities, and storage habits. The authors urge sensitivity to life styles in studying community housing needs for specific populations of elderly. (Vance Bib. No. A-31)

U.S. Department of Housing and Urban Development. <u>Occasional Papers in</u> Housing and Community Affairs: Volume 1., (December 1978).

These papers report on the needs of the elderly and the assistance and services they presently receive. The "independent elderly" provide the focus for study. Difficulties were encountered in defining this group because of the fact that most constricted definitions of the group include most of those who are 65 years of age. One paper, therefore, attempts to define the independent elderly and describe their housing situation. Other papers in the series address issues, such as, the housing problems of the community - resident elderly; government housing programs; and finally, integrating housing and social service activities for the elderly household.

Young, Wanda, and Masell, Doris. <u>Nonformal Program Development:</u>
Housing for the Aged - Housing Needs Assessment of the Elderly and <u>Disabled in the Saskatoon Area of Saskatchewan</u>, College of Home Economics, University of Saskatchewan, 1981.

The purpose of this study was to describe conditions in the homes of the elderly and disabled and to develop programs to support independent living. Differences between rural and urban, and elderly and disabled persons are considered....Standard SPSS statistics, three-way analysis of variance and Scheffe test, factor analysis, and discriminant analysis are used....

...Differences observed between rural and urban subjects included a greater ability and willingness to cope with the rural environment and fewer disabled persons. Greatest difficulty was in receiving help from the family, finding other forms of household help....

...Least satisfaction was for participation in activities when the weather was extreme, delivery services from the markets and drugstore. The highest values were regular lifestyle, family ties, and remaining in same dwelling. The lowest values were cultural arts and skills, luxurious lifestyle, and prestige. Programs should be planned for all groups, but especially for rural and disabled persons. Rural persons preferred information on radio, television, in print, or in-home visits....(AUTHOR)

2. SHELTER DESIGN FOR THE ELDERLY



Shelter Design for the Elderly

2. The citations contained in this section concern new and innovative approaches to the design of housing for the elderly. The bulk of the annotations report on design guidelines or criteria specific to the elderly. Other citations focus on the interrelationship of design and environment for the elderly. Examples of existing or proposed housing projects are also provided.

Anderson Notter Associates Inc. "Recycled Tannery Provides Historical and Spatial Amenities for Elderly near Boston", <u>Architectural Record</u>, (Sept. 1977): 124-126.

This article outlines the conversion of an abandoned Boston tannery into a 284 unit project for the elderly. Similar potentials exist in many communities and this project presents an outstanding example. Several illustrations and photographs show design details of this conversion including site plan, elevations, room plan and section, exterior and interior design, and landscape features.

Aranyi, Laszlo and Goldman, Larry L. <u>Design of Long-term care</u> facilities, Van Nostrand, Reinhold Co., New York, N.Y., 1980.

This volume provides extensive information on starting, designing, and operating an institution that best serves the needs of the elderly. Taking the reader from vacant tract of land to thriving facility, it covers every step from site selection to choosing the best interior color scheme. The authors - who are respectively an architect and a nursing home operator - carefully researched the special needs of the aged, then inspected numerous successful care centers...to see how they meet these needs effectively. The result of their efforts is this handbook - a guide to creating an economically feasible institution that engenders the greatest feeling of independence, security, and self-respect in all of its elderly residents. (AUTHOR)

Central Mortgage and Housing Corporation (CMHC). Housing the Elderly, Standards Division, Ottawa. (1978): 36.

Housing the Elderly is an advisory document dealing with desirable standards of housing designed specifically for elderly people who are sufficiently healthy and mobile to live independently in self-contained dwelling units. Its purpose is to assist those intending to organize, finance, design, or build housing for the elderly, and therefore it should not be rigidly interpreted as a manual of rules. Rather, it should provide a starting point for discussion, with local conditions pointing to final modifications of design and criteria.

Nursing and convalescent homes and hostel-type accommodation provide specialized shelter and care facilities which are beyond the scope of this publication and are therefore not included. (AUTHOR)

Cluff, A.W., and Cluff, P.J. Architects and Planners. <u>Final Draft:</u>
<u>C.M.H.C. Design Guidelines - Nursing Homes and Hostels with Care</u>
for the Elderly, (December, 1978).

These guidelines were prepared because, under the National Housing Act, C.M.H.C. found it necessary to establish clear design guidelines to establish social housing policies for elderly persons who require care. Demand for such guidelines came from both C.M.H.C. field staff and Provincial governments.

The study involved a cross-Canada survey of existing facilities built under Section 15.1, Section 40 and 43 of the N.H.A., as well as a comprehensive review of the "state-of-the-art" (eleven working papers). The final document is a compendium of information derived from many sources. Topics covered include: Philosophy of Care for the Elderly; Programming and Design Options; Architectural Considerations; Detail Design.

Hemingway, Peter. "St. Albert Senior Citizen's Village, St. Albert, Alberta." The Canadian Architect Yearbook Awards, The Canadian Architect (Dec. 1976): 34-36.

This article explains the project for elderly in St. Albert, Alberta. This project contains a number of interesting design features not common in most housing for elderly, such as: non-institutional treatment of corridors (treated as interior streets with small furnished squares along the way); a pleasant landscape, including garden plots; a tea house; etc.

Hoyt, Charles. "Three Projects by Hoberman and Wasserman-Architecture in Context", Architectural Record, (Sept. 1974): 125-134.

Two of the projects in this article are designed for the elderly: Schener House and Agnes Morley Heights. Schener House contains 197 efficiency and one-bedroom apartments for the elderly and is located in Brooklyn, New York. This high rise projects features a number of design elements shown in illustrations and drawings. Agnes Morley Heights was designed for 223 elderly residents, in Greenwich, Connecticut. It is a worthwhile illustration of architectural design for elderly.

Jackson Ypes Associates, Architects. "Wishing Well Manor, Scarborough, Ontario." The Canadian Architect, (Aug. 1977): 29-30.

This article reviews an apartment project containing 295 units for senior citizens in Scarborough. This is a high rise project located in a high density area. Three pages of photos, plans and

text show and explain various design features and technical details.

Jones, Edward, architect. "Housing for Elderly People: Hounslow, London." The Architectural Review, (Feb. 1979): 105-108.

This paper presents the project for the elderly in Hounslow, London, England. The scheme is an attempt to reinterpret the historic form of buildings (14 in this case) around a court. Pergolas, planting, landscaping and a number of other design details make it an interesting design example for the elderly.

Obenland, Robert J. <u>Behavioural Factors for Elderly Housing Design</u>. Concord, New Hampshire: The Corporation, (1976).

This booklet is organized to acquaint sponsors, developers, architects and others involved in developing housing for the aged with some of the major environmental issues of elderly housing design. It focuses on optional housing environments for the semi-independent elderly, and examines some of the major issues from the perspective of the architect/behavioural scientist. (AUTHOR)

Silverman, Jane. "Housing the still-independent if not-so-active elderly." Housing, (Nov. 1981): 64-69

The article describes a specific group within the aged population and a number of detailed design aspects and requirements for this group. Discussed are: floor plans; indoor-outdoor space; storage; kitchens; bathrooms; sense of community; non-institutional character; multi-purpose rooms; security; and, easy circulation. The text is supported by a great number of illustrated examples.

Steinfeld, Edward. Barrier-Free Design for the Elderly and the Disabled. Produced by All-University Geronotology Center and Center for Instructional Development, Syracuse University. Syracuse, New York: Syracuse University, 1975.

This is a self-instructional learning module prepared for practicing professionals interested in environments for the aged. The module has four parts. Part One, Concepts and Background, includes definitions, discussion of important concepts, historical background and a bibliography. Part Two is an audio-visual presentation of older people's own observations about barriers in their environment. Part Three is a workbook which includes: a) presentations of anthropometric and other human factors information and b) a series of analysis problems carefully designed so that the users of the module can instruct themselves about specific barrier-free design features. Part Four provides evaluation problems. (Zeisel Bib.)

Stern, Robert, architect. "St. Joseph's Village" <u>Architectural Design</u>, 4, (1977): 282-283.

This article is a review of the St. Joseph's Village project on Long Island, New York. This complex has a distinct village design in terms of urban form and architecture. This short article is supported by illustrations, including village layout, circulation layouts and photographs.

Trevor Dannat & Partners, Architects. "Housing for the Elderly, Felbridge, Surrey". <u>The Architectural Review</u>, (Dec. 1978): 371-373.

This is an interesting example of a design for a 15 unit cluster of housing units for the elderly in Felbridge, Surrey, U.K. Ten bedsitting room units, 4 one bedroom, a three bedroom unit and various common facilities are clustered around a landscaped court. Plans and photographs accompanied with a brief description illustrate the concept.

Ulrich Franzen & Associates, architects., "A Non-box for the Elderly: Torrington Tower.", <u>Progressive Architecture</u> (May 1973): 72-75.

This article presents an interesting 200 unit high rise project for elderly housing in Torrington, Connecticut. The main design effort was to create an interesting high rise form as opposed to the box shape towers so typical for elderly housing. This article includes a number of photographs and plans.

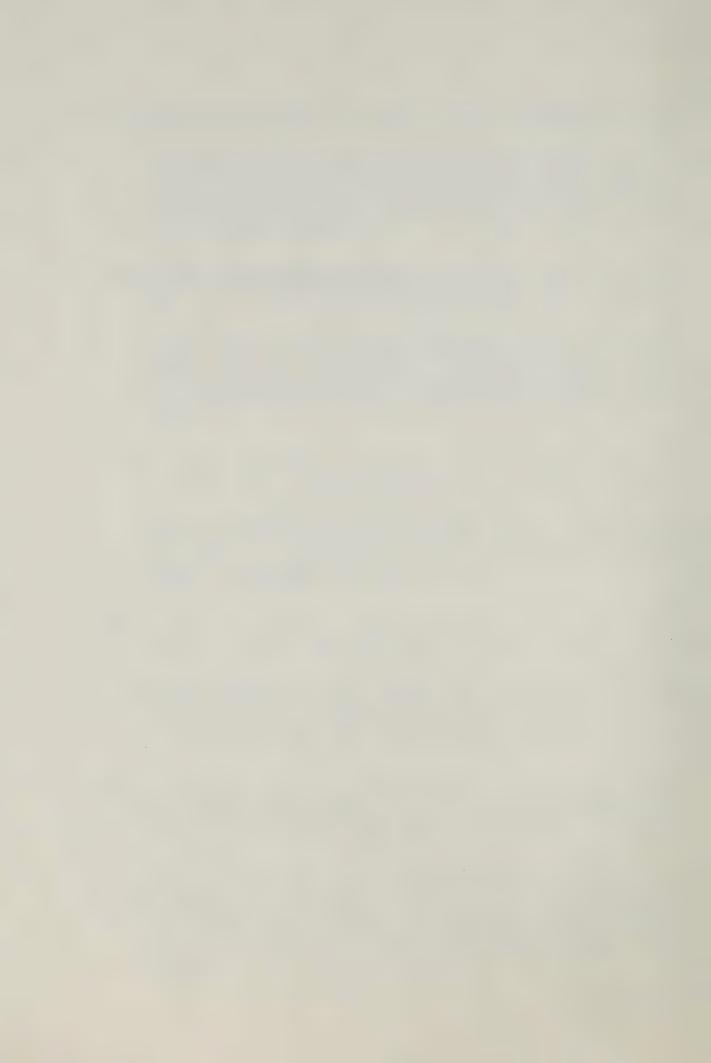
Wiegand, Paul, architect. "Deseronto Senior Citizens Building, Deseronto, Ontario." The Canadian Architect, (Sept. 1978): 34-37.

This article presents an award-winning senior citizen project from the 1977 Canadian Housing Design awards program. Located in Deseronto, Ontario, it contains 35 units and basic facilities. It features an interesting two storey design form as well as a number of design details (outlined in this article).

Zeisel, John, Epp, Gayle, and, Demos, Stephen. Low Rise Housing for Older People - Behavioural Criteria for Design, Department of Housing and Urban Development, Office of Policy Dev. & Research, Cambridge, Mass., U.S.A. Sept. 1977.

This book deals with detailed design criteria for units and buildings serving the needs of the elderly. It is profusely illustrated and includes many architectural diagrams. It discusses the following topics: The edge and inside of the unit; community activity and "neighbouring" spaces; the site; and links to the town. It includes an annotated bibliography as one of its appendices.

3. TYPES OF SHELTER ARRANGEMENTS



3. Types of Shelter Arrangements

Trends seem to indicate that there will be a movement towards a healthier, more independent, active, vocal, and better educated older population. Such seniors will seek more choice and control over their lives.

Future alternative living arrangements must be broad and varied enough to meet the emerging demands of this older age group. References focussing on such shelter arrangements as congregate housing, granny annexes, multi-generational family households, new community environments, sheltered housing, and multi-level accommodation have been included.

Anderson, David. "Alternatives to Nursing Homes." Modern Health Care, 5, (May 1976): 16e-16g.

An alternative to traditional nursing home arrangements are investigated in this case study. The Methodist Hospital Retirement Center in Madison, Wisconsin is used as an example. Features in this Centre include: meal service and cafeteria; emergency health care; help with the routine physical aspects of life (laundry, grocery shopping, house cleaning etc.); flexible special arrangements (residents' own furniture; joint tenancy); privacy. Future plans call for construction of semi-independent and nursing care facilities.

Brody, E. "Community Housing for the Elderly - The Program, the People, the Decision-making Process, and the Research," <u>Gerontologist</u>, 18, (February 1978): 121-131.

The well-being of tenants of a community housing project are compared to two equivalent groups of older people: those who moved to other kinds of housing and those who did not relocate. The community housing project is described as consisting of nine (9) one-family semi-detached homes located in a residential neighborhood proximal to a Geriatric Health Centre. Each house contains three private efficiency apartments (bed-sitting room, bath, and kitchen) and shared living room. Financing of the project and eligibility criteria are briefly discussed. Subjects of each group were questioned concerning why they might desire to move into the project. The most frequently articulated reasons include: fear of crime, loneliness and the desirability of the project because of its accessibility to health services and other facilities.

Results of the study indicate that tenants of the project as well as those of elderly who moved elsewhere were more satisfied with their neighborhood, but the former were more so and especially pleased with the design of their apartment. Initially, some of the project tenants complained about sharing living rooms, the lack of

bathtubs in the bathrooms and the smallness of the apartments. None objected to the age-segregation afforded by the arrangements provided. (Vance Bib. No. A-31)

Bulter, Alan, Oldman, Christine and, Wright, Richard. <u>Sheltered Housing</u> for the Elderly: A Critical Review. The University of Leeds, Department of Social Policy and Administration. August 1979.

The aims of this review are three-fold. The first aim is to review the published literature on the subject of sheltered housing, both that which relates to empirical work and that which is essentially either descriptive or theoretical. The second aim arises from the first. (The authors) have collated the numerous sources of fragmented information in order to compile a reference tool on the subject of sheltered housing. For example, (they) have brought together all the scattered references to the characteristics of those living in sheltered housing ---. A bibliography on sheltered housing concludes the review; this includes material published in the first three months of 1979. (AUTHOR)

Bulter, Alan, and Oldham, Christine. "The Objectives of Sheltered Housing: Implications for Future Provisions." Housing Review, (March-April 1980): 48-50.

This paper identifies seven rationales underlying the advocacy of sheltered housing. These are discussed under the following headings - housing; emergency; choice, independence; loneliness, community care, and special needs. It is suggested that policy makers and housing and social service practitioners' assumptions about the needs of old people are largely untested.

The main issue addressed is the extent to which sheltered housing is successful in fulfilling these stated rationales. The paper concludes with a series of questions as to the way that sheltered housing, may, and should, develop in the future. (Vance Bib. No. A-31)

Fishbein, Gershon. "Congregate Housing." <u>Geriatrics</u>, 30 (January 1975): 125-128.

This article provides a comprehensive description of a representative number of public housing projects for the elderly in the United States. These various projects have been designed in unique ways to provide the elderly residents with a desirable mix of help and independence. It is suggested that this type of living arrangement offers benefits to older persons as it promotes and encourages companionship, safety, security, and social integration.

Gordon, E. "Congregate Housing for the Elderly," in <u>Designing</u>
Environments for the Aging, by Leonard J. Currie. Chicago:
University of Illinois, 40-46, 1978.

Group living arrangements (congregate housing) for the elderly are explored, as an alternative for somewhat dependent populations neither desiring or needing the total support provided in a nursing home. The author cites the literature that supports the need for relatively independent living arrangements and describes the structure of several prototypes of this category of housing. Legal and financial considerations are also discussed. (Vance Bib. No. A-31)

Green, Isaac and others. Housing for the Elderly: The Development and Design Process. New York: Van Nostrand Reinhold, 1975.

This manual provides an overview of the process of providing quality housing for the elderly. Also a source book of information for specific technical questions surrounding the development process, a designer's guide, an ideabook and a handbook. Programming and planning, site selection, design, technical standards and resources are discussed. Types of housing considered are: 1) Independent Elderly Housing; 2) Independent Elderly/Family Mixed Housing; 3) Dependent/Congregate Elderly Housing; and 4) Independent/Congregate Mixed Housing.

Among the informative material in the programming and site selection sections are square footage requirements and examples of various types of dwelling unit floor plans, site requirements and alternative site designs for different types of communities, and preferred distances to supportive services. The design section identifies fundamental concepts regarding human needs and the aging process. The resources section concludes with an excellent bibliography and useful list of organizations and educational centers in aging. (Vance Bib. No. 13)

Housing for an Aging Population: Alternatives: Proceedings of a Conference in Toronto, University of Toronto, November 7-8, 1980. Edited by B.T. Wigdor and L. Ford, Toronto, Ontario: The Programme in Gerontology, 1981.

This Conference on Housing grew originally from a need felt by planners and designers for housing for the elderly, and their concern about future trends in view of the changing age structure of the population. Although the title remained as housing, the planning group soon found the real issue was complex and that the broader term "shelter" expressed the concern more accurately. The topic then became what are the changes in Canadian society and how will they influence shelter needs in the last part of the twentieth century.

The objectives of the Conference were innovative in bringing together knowledgeable people in a variety of disciplines and practice as well as levels of government -

- 1) to clarify the implications for design and planning of shelter needs in view of demographic, economic and social changes related to the changing age structure of Canada;
- 2) to clarify the roles of federal, provincial and municipal levels of government and the interrelationship of various ministries within government;
- 3) to provide the opportunity for meaningful discussion and the possible emergence of recommendations for meeting shelter needs appropriately. (AUTHOR and Trans Bib.)

Huttman, Elizabeth D. <u>Housing and Social Services for the Elderly:</u>
Social Policy Trends. New York, New York: Praeger Publishers,
1977, 293, text edition.

Written for policy makers, for students of policy issues and for academics in this field. Brings together in one book information and research findings on all aspects of housing the elderly. Chapters cover: Characteristics of the Elderly; Needs of the Elderly; Housing Conditions and Housing Needs; Assistance to the Elderly in Their Own Homes; Specially Designed Apartments and Congregate Housing for the Elderly; Services and Staffing (in such housing); Design of Housing; Special Issues, Case Studies; and (by Ilse Volinn) Nursing Home as Residence and/or Health Facility. (Vance Bib. No. 13)

Lawton, M. Powell, Greenbaum, Maurice, Liebowitz, Bernard. The Lifespan of Housing Environments for the Aging." Gerontologist, 20, (January 1980): 56-63.

This report is concerned with the changes that occur among tenants as a project ages and with the changing service needs of tenants over time. Knowledge of how both tenants and other aspects of the housing environment change is essential in order to optimize person-environment congruence.

Specifically, people have frequently observed that no matter how healthy the original population of tenants in a housing environment may be, those tenants will age and their service needs may change in a major way. This paper examines such changes in two housing environments over periods of 19 and 14 years, respectively. The results from this study will then be used to illustrate how the character of housing environments may change over their 40 to 50-year lifespan. The choices that the sponsor must make will be discussed in terms of constant and accommodating environments, and the outcome associated with such choices will be considered. (AUTHOR)

Lawton, M. Powell. "An Ecological Theory of Aging Applied to Elderly Housing," <u>Journal of Architectural Education</u>, 31, (September 1977): 8-10.

This article compares a "constant environment" to "accommodating" housing environments, where an effort is made to adjust the housing environment to the changes in aging tenants. Stresses inclusion of higher intensity social services as they are needed. Discusses "campus" concept, where change in residence is between units under a single administration on a campus-like setting. Emphasizes all three are desirable in a master plan for housing for the elderly in a community. (Vance Bib. No. 13)

Levy, Joseph. <u>Selected Retirement Communities in Ontario</u>. Department of Recreation, University of Waterloo, August 1980.

The objective of this study was to conduct a preliminary assessment of existing retirement communities in Ontario. A retirement community is considered to be a small community (100-500 residents), relatively independent, segregated and non-institutional. Many communities cater to the independent middle-class Canadian requiring no services. Other focus on "congregate housing" where services ranging from property maintenance and personal care to housing are provided.

The study becomes an evaluation of modular housing as a desirable housing form for retired owners. Five areas of further study regarding modular housing are suggested. (AUTHOR)

MacRae, John M. "Elderly Housing in Northern Europe." Aging. 301-302: 24-28, 1979.

Information contained in the article is from a 1974 survey of elderly housing in several western European countries.

Specifically, the author describes the kinds of accommodations for older people in Holland, Denmark, Norway, Sweden and Finland. Information was collected during site visits through a series of interviews with national and municipal administrators service providers and elderly residents. A range of types of housing are discussed in each of the 13 metropolitan areas: conventional apartments or flats in new or established neighborhoods, "protected" service flats, care facilities, day centers, social and commercial centers, and "new town" or "planned community" developments. (Corke Bib.)

Mindel, Charles H. "Multi-generational Family Households: Recent Trends and Implications for the Future." Gerontologist, 19, (May 1979): 456-463.

This paper concerns the living arrangements of elderly individuals, in particular, those elderly who share households with kin other than their spouse. In addition, it examines and challenges some current beliefs regarding the relationships of elderly and their families. Trends in the living arrangements of elderly in the 20th century will be examined through the use of data collected by the U.S. Census Bureau. Finally, some suggestions for policy will be presented. (AUTHOR)

National Conference on Congregate Housing for Older People. Congregate Housing for Older People. An Urgent Need, a Growing Demand. Edited by W.T. Donahue, M. McGuire Thompson, and D.J. Current. Washington, D.C.: U.S. Department of Health, Education, and Welfare, 1977. (DHEW Publication No. (OHD) 77-20284).

Congregate housing should be envisioned as encompassing a variety of assisted living environments that provide physically, mentally, or socially impaired older persons with both appropriately designed housing and assured access to services on an as-needed basis. As the papers in this volume make evident, the conference was addressed primarily to the task of stimulating both public and private sectors of the housing industry to recognize congregate housing as a necessary, socially useful, and profitable field of activity and to facilitate their mutual involvement in its nation-wide development. (AUTHOR) (Trans. Bib.)

Noam, Ernst. A Study of Congregate Housing for the Elderly in Europe, Paper presented at First National Conference on Congregate Housing for Older People. Washington, D.C.: A.O.A. National Clearinghouse on Aging, DHEW Pub. #75-20104, November 1975.

A review of congregate housing in West Germany, France, England, Holland, Belgium and Switzerland, based on personal visits and literature review. Findings showed few people lived in congregate housing, or "grouped flatlets;" the most important reason for this was the determination of the elderly to remain in their own homes, preferring an individual life to a communal existence with other old people. The author feels congregate housing will eventually house five per cent of the European elderly. (Corke Bib.)

Obenland, Robert James, and Blumenthal, Morton J. A Guide to the Design and Development of Housing for the Elderly. New England Non-Profit Housing Development Corporation, 1978.

This booklet is intended to be a basic primer in non-profit elderly housing development. The intention is not to provide a step-by-step process, for no project is ever the same as any other, but to provide a brief discusion of each of the many issues to be encountered.

The booklet is divided into 8 chapters or topic headings. The first chapter contains an overview of the non-profit housing development process; each subsequent chapter then discusses in some detail, specialized areas of concern.

To a great extent these chapters define the elements of project feasibility and success; headings include: housing needs, housing demand, elderly services, housing concepts, management, funding sources and site analysis.

Each chapter outlines in broad strokes what the issues are, and discusses some of the options and choices for problems to be encountered. (AUTHOR)

Pringle, Bruce M. "Housing Living Arrangements for The Elderly: Some Ideas from Northern Europe." <u>Journal of Property Management</u>, (March-April 1979): 44-78.

This article reports on the housing situation for the elderly in Europe and provides examples of the way the various types of living arrangements influence the quality of life of elderly residents. Three main issues are discussed: 1) The advantages and disadvantages of large housing facilities for the elderly; 2) home care as an alternative to institutionalization; and 3) ways to increase the extent to which extended families house and care for their elderly members. The material contained in the article is based on visits by the author in 1977 to Finland, Sweden, Norway, Denmark, the Netherlands, Belgium, and England.

Shepherd, Paul L. <u>Granny Flats: Independence with Security-Management Plan</u>. Upper Shore Aging, Inc., Washington, D.C., January 1979.

The Granny Flats concept of housing is more than just a manner of providing a residential unit. It is a direct attempt to maintain existing support systems within the family structure, while allowing the elderly individual independent living in a separate apartment. This concept would be self-sustaining inasmuch as all operating costs and depreciation costs for all equipment of the program would be included within the rental structure.

This paper describes the different design and living arrangement features of Granny Flats as well as outlining the rationale for developing the Granny Flat Concept. Finally, five targets have been established for the project and a detailed account of the organization and coordination of a feasible scheme is provided.

Sherman, S.R. "Satisfaction with Retirement Housing: Attitudes, Recommendations and Moves." <u>Aging and Human Development</u>, 3, (April 1972): 339-366.

The article reports findings of a survey of 600 persons who had elected to live in special group housing for the elderly. The sample was selected from residents of six types of facilities: urban high rise, life-care home, retirement hotel, rental and purchase villages and an apartment tower. Responses of the study group were compared to those of matched controls who lived in conventional housing.

Findings indicate that satisfaction appears related to: proximity of resources, security, balance of independence-dependence, degree of financial commitment, psychological readiness, comfort provisions, social integration and the proper amount of age segregation. The study confirms results of other research indicating that aging persons vary in the degree of age segregation that is desirable. Their satisfaction with housing does depend significantly on the facility's provision of the amount and quality of age integration appropriate for them. The author points out the need for providing alternatives to meet a variety of needs. (Vance Bib. No. 395)

Steinhauer, M.B. "Housing Trends of the Elderly: Emerging Policy and Implications." <u>International Journal of Public Administration</u>, 3, (1981): 283-312.

Housing and living environment options are both one of the most pressing problem areas for the elderly and an unavoidable policy subject for public administrators. This article analyzes the topic of housing and the elderly so as to highlight selected dimensions that might have implications for decision-makers in resource considerations and allocations. An opening section gives the status of how and where the elderly are now living. Six events, or environmental and policy changes, that affect the housing options of the elderly are analyzed. These events are: high mortgage rates; rent controls; condominium conversions, tax relief measures, weatherization programs; and reverse annuity mortgages. The two dominant trends that appear to shape the future housing options of the elderly are examined. The first trend is the provision of a range of alternatives in living arrangements. The creation of alternatives, also known as a continuum of living environments. includes congregate housing, share-a-home, life care or continuing care, geriatric foster care, and single room occupancy hotels. The second major trend is the increasing provision of services in the home setting. The final portion draws together the evident implications about the housing problems of the elderly for policy makers in the public management field. (Trans. Bib.)

Stryuk, R.J. and Soldo, B.J. <u>Improving the Elderly's Housing: A Key to Preserving the Nation's Housing Stock and Neighborhoods</u>, Cambridge, Massachusetts: Ballinger Publishing Co., 1980.

"This book was written to provide the U.S. Dept. of Housing and Urban Development (HUD) with a set of carefully documented alternatives to its current housing programs, alternatives that emphasize helping the elderly who are residing in the community to live in adequate housing." "A demography of aging has grown during the past decade, and the economics of housing has been a major issue in both the policy and academic works since the New Deal. However, we have not had an economic or a demographic treatment of housing for the elderly to put into better perspective the primarily socialpsychological or service delivery contribution of gerontologists to the housing literature." Chapter headings include: the elderly and their housing and the housing market; the current housing situation; determinants of dwelling maintenance by owner occupants; social services and housing quality; location and neighborhood conditions of the elderly; existing housing and neighborhood a critical review, the scope of existing preservation programs: social programs; new initiatives in housing services. Subtopics addressed include: familiarity with neighborhood, attachment to a home, informal support systems, and the intricacies of the interaction between personal competence and the housing environment. (Quotes taken from forword and preface). (Trans. Bib.)

Stryuk, Raymond I. "Housing Adjustments of Relocating Elderly Households." <u>Gerontologist</u>, 20, (January 1980): 45-55.

The housing adjustments made by elderly-headed households are of extreme importance to the gerontological community, both because they may be crucial to improving the well-being of the elderly and because of the impacts that such adjustments can have on others in the community.

This paper presents a straight-forward empirical analysis of the housing adjustments made by a national (U.S.) sample of low-income elderly headed households at the time they changed dwelling units. Housing changes studies are changes in the number of rooms, structural deficiencies, housing expense burden, and owner-occupancy or renter status. Adjustments are found to be highly diverse; for example, a large number are moving from small to large units as well as from large to small. Multivariate analysis of the changes is performed using data on the initial year's and changes in the household's health and economic status, family composition, and support by family members not living in the home.

The major strength of the analysis is the use of the very rich data set from the Survey of Low-Income and Disabled (SLIAD). (AUTHOR and Trans. Bib.)

Thomas, Dawn F. "Maryland Pioneers New Concept in Housing," <u>Aging</u>, (February-March 1977): 268-269:21-14.

This article discusses desirability of the "sheltered" housing program which, in residential living, combines shelter, meals and services. It provides older people, who are temporarily or permanently disabled, with assistance in performing personal and household functions associated with independence, to provide an alternative to institutionalization. (Vance Bib. No. 13)

Tinker, Anthea. Housing the Elderly: How Successful are Granny
Annexes? Report for the Department of Environment, The City
University, London, U.K., Housing Development Division Paper 1/76,
1976.

The research on which this paper is based sought to discover what provision local authorities had made in the way of Granny Annexes and to evaluate a sample of schemes. This is a study of an unusual way of keeping the elderly within the community. A sample of 11 local authorities have done this by providing 'Granny Annexes' which are self-contained homes attached to family houses. Some are bungalows, others are ground or first-floor flats. These schemes have been evaluated by interviewing officers of the local authorities concerned, the 128 elderly tenants (and the neighbours to whom they were linked) and by comparing these elderly with other elderly people.

The findings about this group of elderly are significant pointers to the future. The residents in Granny Annexes were older, more of them were disabled, and more lived alone, than among the elderly population as a whole. They varied in the degree of disability but nearly all of them needed some kind of help with jobs like housework, gardening and the laundry. It is estimated that 22% (of whom half had their own families next door) would have been in residential care had not outside support been available. It is a matter for concern, however, that a further 7% were barely managing. (AUTHOR)

Urban Systems Research and Engineering Inc. <u>Evaluation of the Effectiveness of Congregate Housing for the Elderly</u>. Cambridge, Massachusetts: U.S. Department of Housing and Urban Development, Office of policy Development and Research, October 1976.

Many previous studies had examined single congregate facilities or small groups of them in comparative analyses. No studies had selected a wide range of congregate facilities and analyzed their common versus varying characteristics, or examined their differential impacts on the residents. This, then, was the purpose assigned to the present research: a broad-based analysis of congregate housing in the United States today describing its essential characteristics, the characteristics of its residents, and assessing its role as an alternative living arrangement for the

elderly. Thus this research serves two important functions: (1) it provides a comprehensive and detailed report on the range of congregate housing facilities that exist in the United States today; (2) it evaluates the impact of congregate housing on the elderly. (AUTHOR) (Trans. Bib.)

Varady, David P. "Housing Problems and Mobility Plans Among the Elderly." <u>Journal of American Planning Association</u>, (July 1980): 301-314.

This paper seeks to determine the ways in which the residential mobility process among the elderly is different from that of the non-elderly. A mobility model consisting of three sets of variables is presented and tested: (1) background characteristics (related to the individual, dwelling unit, and neighborhood) and housing and neighborhood problems, (2) housing and neighborhood satisfaction, and (3) intra-metropolitan moving plans. Regression analysis is utilized to explain variations in the likelihood of formulating intra-metropolitan moving plans among a sample of elderly residents of Cincinnati, Ohio. Residential problems (i.e., rising costs, physical deterioration, and crime) and failing health are shown to be important determinants of moving plans. Several background characteristics contribute to plans to remain, as does participation in governmental housing programs for the elderly. These results imply that an expansion in these programs could enable many elderly to remain in their homes who otherwise would have to move. (AUTHOR)

Wilner, Mary Ann, and Witkin, Janet L. "Shared Living for Elders: A Viable Alternative." Challenge 1980, U.S. Department of Housing and Urban Development, (1980): 5-11.

Shared housing arrangements for the elderly are discussed in this article as viable and beneficial alternative living environment for those: who have been frustrated in their housing needs; who want to share their lives with others; who want to maintain a sense of independence. Two examples of recent alternative housing programs (initiated by Back Bay Aging Concerns Committee - Boston and Alternative Living for the Aging - Los Angeles) are used as examples to prove that shared living projects can be developed and administered successfully and without the help of professionals. (AUTHOR).



4. SHELTER POLICY AND/OR PROGRAM OPTIONS



4. Shelter Policy and/or Program Options

This section reviews on a selected number of shelter policy and programs for the elderly, both existing and proposed. Subjects include: programs encouraging independent living (e.g. in homes through home equity dissaving and home maintenance schemes); legislation of government policy and government initiated programs (e.g. Shelter Allowances and Rent Scales for Senior Citizens and Shelter Aid for Elderly Renters Programme (SAFER); public and private incentive programs to promote the development of different types of shelter arrangements. This policy and program area is currently the subject of considerable discussion and innovation.

Alberta. Department of Housing and Public Works, <u>Home Equity Dissavings</u>
Plans for Elderly, Department of Housing and Public Works,
Edmonton, (1979).

This study was undertaken at the request of the Alberta Home Mortgage Corporation Board, and the purpose was to assess the "state of the art" of home equity dissavings plans in Canada, the United States and Britain, in terms of the: rationale; types of plans in existence; institutional and legal constraints in Canada; and market potential in Alberta. The report concludes that the programs are complex to administer; there is very little market research on which to base an assessment of need, demand or acceptability; but that the programs have great potential. The roles of the government and the private sector need careful consideration. (Corke Bib.)

Bairstow, Dale. <u>Fair Share Housing for Senior Citizens in the Greater Vancouver Regional District in 1976</u>, Greater Vancouver Regional District, Vancouver, (1976).

This brief paper outlines the problems being experienced in British Columbia because of the absence of a rational policy concerning the location of senior citizen housing. The author suggests a "fair share" allocation method, and reviews U.S. experiences in Dayton, Ohio and Washington, D.C. with such a method. He presents data from British Columbia to illustrate the proportion of the low-income elderly market which has been served in different municipalities, and compares the different levels of service among municipalities. Five alternative methods are discussed for rationally allocating housing for seniors in the Greater Vancouver Regional District. They range from a coordinated approach to existing methods, to fair share methods based on need. (Corke Bib.)

City of Oshawa. <u>Senior Citizens Accommodation: Housing Policy</u> Statement, (April 1978).

A large proportion of senior citizens within Oshawa have severe accommodation problems because of income and physical limitations, but this is more than just a housing problem. Many senior citizens are on fixed incomes that are not keeping pace with rapidly rising inflation. Because accommodation costs represent the largest single item in a senior citizens budget, any increase in accommodation prices, rental or ownership, causes this group to experience the most severe problems.

This study examines in detail both the existing and future accommodation needs of senior citizens in Oshawa until 1986, and establishes targets for different types of senior citizens' accommodation which should be produced in the City over the next 9 years. From this in depth analysis a recommended policy and implementation strategy for the period 1978 - 1980 is derived, to achieve the production of the targets as established. (AUTHOR)

Co-operative Housing Federation of Toronto. Housing for Senior Citizens: Is The Non-Profit Co-operative Housing Program Feasible? Toronto, Co-operative Housing Federation of Toronto, Inc., April 1980.

This study was carried out in order to assess the potential of the non-profit co-operative housing model under present financing programs as an answer to the housing needs of senior citizens. The report discusses the acceptability of the non-profit housing model to senior citizens. The availability of subsidized financing to non-profit housing co-operatives, and specifically the ability to use such financing to produce affordable housing projects, is investigated in this report. (AUTHOR)

Corke, Sue. Elderly Homeownership and the Preservation of the Housing Stock: The Case for Government Intervention and Some Recent Program Suggestions, Centre for Urban and Community Studies, University of Toronto, (Sept. 1980).

The purpose of this report is to draw on very recent literature from the United Kingdom, the U.S.A., and Canada in order to accomplish three objectives. Firstly, to demonstrate the nature of the problems faced by the low-income, elderly, home owner with particular regard to maintaining his housing unit. Secondly, to make the case for government intervention. Thirdly, to present largely descriptive material concerning program responses under consideration in these three countries, and to note their particular relevance for housing stock preservation objectives.

The purpose of this paper is to outline the British and U.S. cases for consideration, together with brief notes on the shortfalls of existing programs being used to prop up a bad situation. Clues

about the existence of a similar situation in Canada are presented. A second section attempts to describe the various types of policy and programme response suggested for dealing with the problems, and offers some comments on their relative merits. (AUTHOR)

Davis, Anne. "Dissavings Programmes for Senior Citizen Homeowners", B.C. Housing Quarterly, 1, (October 1978): 3-7.

Many elderly homeowners have a serious income problem which could be alleviated if they were able to use the equity in their house as a source of income without moving out of the house. The concept of "dissaving" may offer a solution to this problem. Dissaving is the opposite of saving - it is the process of using up accumulated savings rather than adding to them. This article outlines the various "dissaving" methods that could be made available to the elderly. These include: property tax deferral; split equity housing annuity; reverse annuity mortgage; and, sales-leaseback arrangements. (AUTHOR)

Epstein, Don. <u>Retirement Housing in Urban Neighbourhoods</u>: <u>Some Inner City Options</u>, <u>Institute of Urban Studies</u>, <u>University of Winnipeg</u>. <u>Winnipeg</u>, <u>Manitoba</u>, <u>July 1976</u>.

This study is intended to reflect the views and conditions of most older people in Winnipeg's Inner City; the attitudes of the users of housing for the elderly. Objective is to document salient facts about conditions and life styles of the elderly in housing, activities, finances, etc., and to extrapolate from the data certain guidelines for public policy and housing programs relative to the elderly. Also to detail specific optional plans and designs for housing elderly persons in the inner city. (AUTHOR)

Heumann, Leonard, and Lareau, Leslie. <u>Identifying the Housing and Support Service Needs of the Semi-Independent Elderly: Toward a Descriptive Planning Model for Area Agencies on Aging in Illinois, The Board of Trustees, University of Illinois, 1977.</u>

This report presents the findings of a two year study on housing and support service needs of semi-independent elderly. The purpose of the study has been threefold: 1) to define those elderly persons who suffer from various functional impairments and marginal sound adjustments but are not so ill as to require a totally dependent environmental setting; 2) to define the universe of housing, financial, environmental and supportive service needs of those elderly persons in Illinois; and to explore the possibility of enumerating the population at the local level in such a way that local, state, and federal governments charged with the responsibility for upgrading and maintaining the quality of life of the elderly in our communities can accurately plan for, and create, the housing and support service programs that will keep the semi-independent elderly in safe, dignified, and fulfilling environments that are as independent as their disabilities will allow. (AUTHOR)

Inter-Provincial Task Force on Shelter Allowances and Rent Scales for Senior Citizens, Report of the Inter-Provincial Task Force on Shelter Allowances and Rent Scales for Senior Citizens, the Task Force, Victoria, British Columbia, (1978).

At a provincial housing ministers' meeting in 1978, an interprovincial task force was struck to examine the question of shelter allowances and rent scales for seniors. In particular, the task force focussed on the British Columbia SAFER program; and on the short run and long run implications of the SAFER rent-to-income formula and the Alberta 30% rent scale, on federal and provincial subsidy levels. The report discusses the role of governments in senior citizen housing, and the two different policy approaches of (i) direct housing provision; and (ii) shelter allowances. The long run cost implications are presented. (Corke Bib.)

Kendig, Hal. <u>Identification of Supportive Neighbourhoods for the Aged</u>, University of Southern California Andrus Gerontological Center, presented to the Annual Meeting of the Gerontological Society Portland, Oregon, October, 1974.

This paper develops concepts and methods by which area planning agencies may organize local information to advocate for improved municipal policies for the aged. The municipal mandate to regulate land use presents a major "untapped resource" to improve housing and neighborhood conditions for the functionally impaired aged...

--. (the paper deals with) neighborhood conditions important for the aged with limited mobility in areas such as accessibility, social composition, social problems, and environmental hazards. It also identifies sources of data useful to describe local conditions in relation to the elderly (U.S. Sources), and identifies possible municipal policy options.

Klemrack, D.L. and L.L. Roff. "Public Support for Age as an Eligibility Criterion for Programs for Older Persons." Gerontologist, 20, (1980): 148-153.

This study examines the extent to which the population accepts "old aga" as a criterion for receiving tax supported services and benefits. Results indicate that a majority of respondents do not favor the use of advanced age as a sole eligibility criterion for the provision of publicly supported services. The findings indicate that the public assesses eligibility for services on a particularistic basis looking at both the characteristics of the group and the nature of the services.

Findings suggest that although government provision of services and benefits to all elderly might not be generally approved, the specific programs available to older people (who fall within particular categories) do receive majority support. Implications on funding of benefits for the elderly are discussed. (Vance Bib. No. 395).

Liebowitz, Bernard. "Implications of Community Housing for Planning and Policy", Gerontologist, 18, (1978): 138-141.

This paper focusses on some practical matters viewed from the vantage point of the sponsoring agency that are of interest to developers. Issues that are discussed are barriers and facilitators during the developmental and operational phases, economic aspects, the role of the back-up of a large agency such as the Philadelphia Geriatric Center (PGC), potential replicability, and related policy issues. Some small projects elsewhere are reviewed in terms of their similarities to and differences from Community Housing. (AUTHOR)

Mayer, Neil S. "Grants, Loans, and Housing Repair", <u>Journal of American Planning Association</u> (January 1981): 25-34.

Many elderly homeowners need assistance in repairing and improving their homes. They receive less of the overall federally funded aid for home repairs than their share of total homeowner needs might warrant. But individual programs differ greatly in serving the elderly. Using detailed data on past program recipients, this article demonstrates that providing assistance in the form of grants rather than loans is critical to gaining elderly households' participation. It also shows that inability to qualify for or repay loans because of low incomes, more than unwillingness to borrow, limits participation by the elderly in repair loan programs. The paper considers various options for obtaining improved housing quality for elderly people and concludes that providing and expanding grant assistance for home repair and rehabilitation is a necessary major component of successful policy. (AUTHOR)

Sherebin, David. "Alternatives for Seniors", <u>City Planning</u>, 1, City of Toronto, December, 1978.

This article briefly reviews various aspects of the role of planning in solving problems confronting the aged. It points out that:

"Housing, especially the aged, cannot be viewed as "shelter" in isolation from other aspects of the environment. The location and design of housing must be considered in the context of familial, social and institutional relationships. Therefore, I believe that the major objective of planning for this age group should be the creation of a truly supportive urban environment, an environment which provides real options in living accommodations and services....

To achieve this goal, we must be imaginative and innovative in developing programs which allow older persons not only to remain physically in the community, but also to take part in the life of the community for as long as they wish and are able to do so. Let us look at a variety of approaches which can expand the housing options for the elderly."

Housing needs are discussed generally in terms of: financial assistance; renovation of seniors homes; community services: the congregate housing and full range of alternatives, and the planning framework. (AUTHOR)

Streich, Patricia. Housing Rehabilitation and Senior Citizens, Canadian Housing Design Council, 1980.

The main purpose of this paper is to review and analyse the measures available to assist senior citizens with repairs to their homes. The review includes the development and rationale of the programs, the extent of assistance and volumes of activity, and some of the issues that have been raised in these provisions.

This paper takes a developmental approach considering the various measures being introduced in different provinces and at the federal level over the seventies. In the comparative analysis, there is some discussion of the relative roles of provincial and federal provisions in relation to dwelling repair particularly for senior citizens.

The rest of this paper is divided into three major sections. In the next section, some general issues associated with repair and rehabilitation programs for seniors are outlined as background for the more detailed review of measures and initiatives in Section 3. The final section, Section 4, presents a comparative analysis of the measures discussed identifying some of the major considerations in the design of provisions for home repair for seniors. The conclusions include some suggestions for further work that the Canadian Housing Design Council should consider for research in this area. (AUTHOR)

5. OTHER REFERENCES



Dee Casto, Marilyn, and Day, Savannah S. <u>Housing for the elderly - Design, Economics, Legislation and Socio-Psychological Aspects; Exchange Bibliography #1128. Council of Planning Librarians, 1976.</u>

The intention in compiling this bibliography was to cite sources pertaining to many aspects of housing the elderly. Included are references from the United States, England, and Canada from 1956 through 1975. Approximately 375 entries are divided into five major sections: (1) design and construction, (2) economic aspects, (3) legislation, (4) psychological implications, and (5) general considerations. Within the major divisions sources are listed as books, bulletins and reports, theses and dissertations, periodicals and bibliographies and arranged alphabetically by the author's last name. (AUTHOR)

Duensing, Edward and Evelyn L. Klinger. Age-Segregated Housing: Its Impact On Elderly Americans And Real Estate Markets. Monticello, Illinois, Vance Bibliographies, 1980. 22 pages. (Vance Bibliographies; Public Administration Series: Bibliography No. 416).

This bibliography draws together the current materials on agesegregated housing and attempts to be complete in all phases of concentrated housing types for the independent elderly.

Housing the Elderly: Proceedings from the Regional Seminars and Workshops Held in Winnipeg, Vancouver, Toronto, Montreal, and Halifax, 1974-1975, Ottawa, Ontario, Canadian Council on Social Development, 1976.

From the recommendations and conclusions of the Housing the Elderly seminars, it was recognized that more work must be done on the income and housing needs of the elderly, especially at the local Therefore, it became clear that part of the service this publication could provide was an updating of current literature and facts on senior citizens in Canada beyond what was available in the Beyond Shelter study. In this way, the publication will be able to serve as a resource document for those doing research, preparing briefs and presentations, or attempting to develop local discussions among senior citizens groups, local agencies, and government departments. It was with this idea in mind, that the decision was made to expand the proceedings of the seminars to include more current information on the elderly population, sources of income, the costs of shelter, and the amount of subsidized housing currently available to senior citizens in Canada. (AUTHOR and Trans. Bib.)

Lawton, M. Powell. <u>Planning and Managing Housing for the Elderly</u>. Toronto, Canada, John Wiley & Sons, 1975.

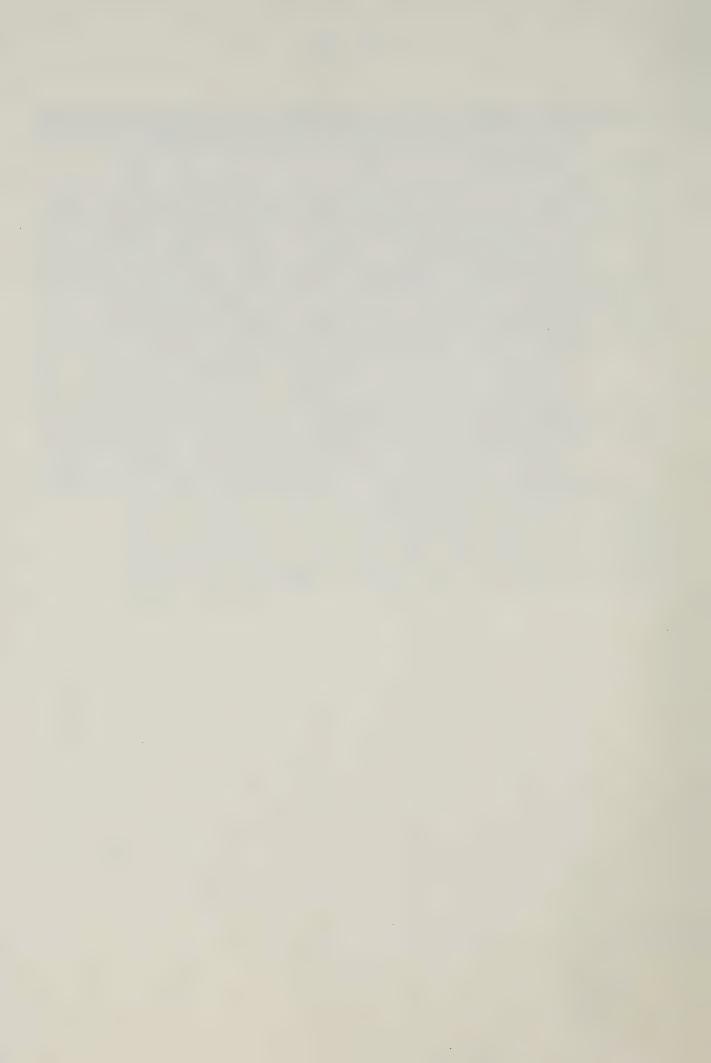
The housing and welfare of the elderly are receiving considerable attention of late. This timely book provides guidance to both laymen and professionals involved in the conception, planning, and management of housing environments for older people. The first part of the book deals with scientific knowledge on the process of aging and its social and psychological aspects, as well as with principles of planning and operating housing for the elderly. Part 2 focusses on the planning and design phase - locating a housing site, determining the scope of the program, and designing the building. Part 3 - Management, Tenants, and Programs - concerns attitudes of those who manage housing for the elderly, how they may assist with tenant problems, and how they can best deliver on-site services. (AUTHOR)

McClain, Jan (editor), <u>Housing the Elderly</u>, Proceedings from the Regional Seminars and Workshops held in Winnipeg, Vancouver, Toronto, Montreal and Halifax, 1974-5, Canadian Council on Social Development, Ottawa, 1976.

The Proceedings include: selected workshop presentations; a summary of main issues and recommendations; highlights from the panel discussions; critical reviews and summaries of selected research publications (including Demographic and Economic Aspects of Housing Canada's Elderly); and, 1976 statistics on senior citizen income and housing. The quality of housing, management of housing, and housing assistance programs are among the issues raised. (AUTHOR)

Vandenburg, Adrian. By Choice or Default: Institutional and Non-Institutional Alternatives in Housing for the Elderly, University of Toronto, Department of Urban and Regional Planning, Major Paper, 1979, 88 pages, (unpublished).

The paper considers the processes by which elderly people come to choose between alternative forms of housing; and the social, environmental and economic pressures which influence their choice of institutional care, even when it may be detrimental to the individual. The author is critical of self-selection approaches to the relationship between the elderly and their housing situation; and to exclusive emphasis on the biological dimension of aging. He stresses the need to take into account the changing social relationships of the elderly and to examine not only personal, but interpersonal and institutional patterns of living before making policy. He presents comparative data on institutionalized and noninstitutionalized elderly concerning socio-demographic data, and and family linkages. A dramatic rise of institutionalization in Ontario is exposed. He concludes that current housing options for the elderly are inadequate, and that housing decisions are made primarily by default. The concept of "congregate housing" is suggested as a solution; a living arrangement which would provide security and support without disrupting existing relationships or inhibiting the formation of new ones. (AUTHOR) (Corke Bib.)



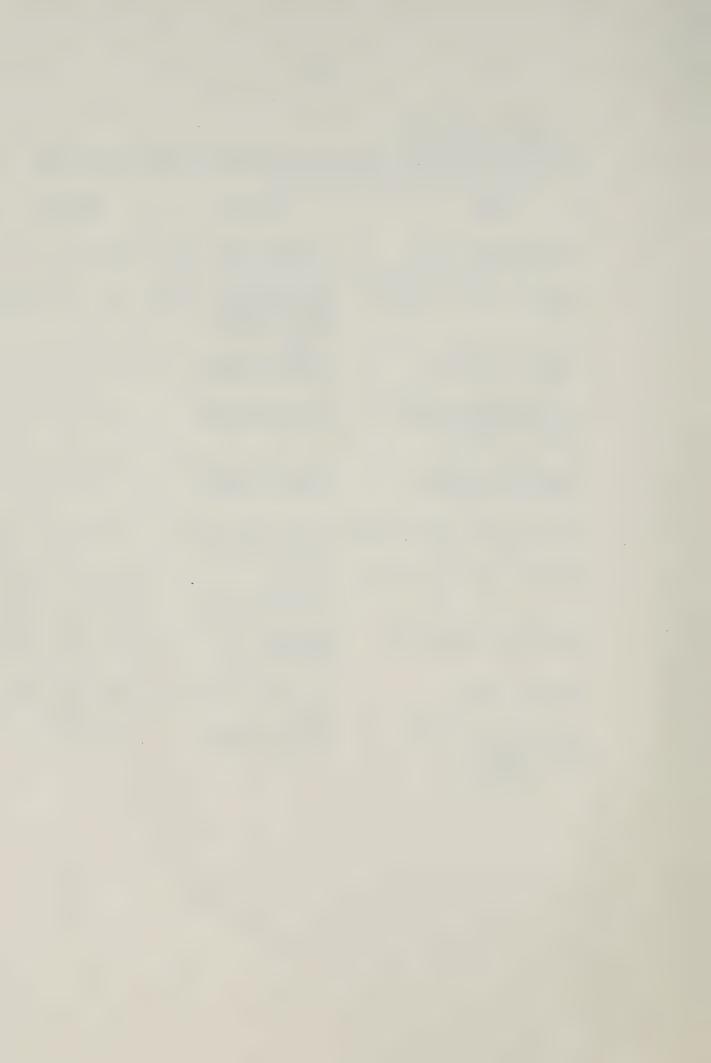
6. SOURCES OF INFORMATION



6. Sources of Information

This section lists the locations and names of agencies from which bibliographic material may be obtained.

<u>Name</u>	<u>Location</u>	<u>Contact</u>
Architectural Library	University of Toronto	Reference Librarian
Canadian Housing Information Centre	CMHC, National Office Montreal Road Ottawa, Ontario	Ms. Leslie Jones
Centre for Urban and Community Studies	150 George Street Toronto, Ontario	Judy Kjellberg
Intergovernmental Committee on Urban and Regional Research (ICURR)	123 Edward Street Toronto, Ontario	as appropriate
J.W. Crane Library (Canadian Geriatrics Research Society)	351 Christie Street Toronto, Ontario	Elaine DuWors
Ministry of Municipal Affairs and Housing Library	56 Wellesley Street Toronto, Ontario	Librarians
Municipal Reference Library	City Hall Toronto, Ontario	Reference Librarian
Programme in Gerontology University of Toronto	455 Spadina Avenue Room 407 Toronto, Ontario	Dr. Blossom Wigdor
Robarts Library	University of Toronto	Reference Librarian
University of Toronto/ York University Joint Program in Transportation	50 George Street Toronto, Ontario	Ann L. Poole



7. GLOSSARY OF TERMS



GLOSSARY

Collective Housing

 a housing type which accommodates an entire family plus the elderly. Services are provided through the family within a homey environment.

Congregate Housing

- assisted independent groupliving environment that offers the elderly (who are functionally impaired or socially deprived, but otherwise in good health) the residential accommodations and supporting service they need to maintain or return to a semi-independent life-style and prevent premature unnecessary institutionalization.

Dissavings Programmes

- the using up of accumulated savings rather than adding to them, as a means to providing shelter.

(The calculation of benefits can be rather complicated because under dissavings plans the elderly home-owner receives payments from the outset, whereas the investor does not recover his/her investment and profit until the house is sold at some time in the future.)

Home for the Aged

 a residential institution which is designated, staffed, equipped, and operated primarily for the purpose of providing domiciliary, supervisory personal, or nursing care to persons aged 60 or over.

Independent Living

 self-sufficient, unassisted, unsupervised, individual housekeeping.

Nursing Home

- A residential institution which is designated, staffed, equipped and operated primarily for the purpose of providing nursing care to persons of any age who require such care but do not require a hospital level of care.

Property Tax Deferral

- Under this "dissaving"
arrangement, senior citizen
homeowners could defer payment
of property taxes until the
house is sold. The deferred
taxes are registered as a lien
against the property. This
allows for a very gradual
liquidation of the homeowner's
assets, and gives the homeowner
more current disposable income.

Reverse Annuity Mortgage

- This "dissaving" arrangement would involve a loan secured by a residential mortgage, repayable upon the death of the borrower or on the prior sale of the property. Under this arrangement, the senior homeowner would retain residual equity in the house. That is, the investor would not acquire full equity in the house upon the death of the senior citizen homeowner.

S.A.F.E.R.

- Shelter Aid for Elderly Renters programme, British Columbia.

Sales-Leaseback Agreement

- Under this arrangement, dissaving" senior citizen homeowners would sell their house outright to the investor, then continue to live in the house as a tenant. One of the formal conditions of sale would be that the buyer would enter into a long-term lease agreement with the elderly homeowner.

Sheltered Housing

- provision of a variety of living arrangements and support with daily living at that margin of need which supplements the individual elderly person's own efforts to maintain an independent household.

Split Equity Housing Annuity

- a "dissaving" arrangement.
- Under a split equity arrangement, the equity in a property is divided into two parts. The first is a life estate or right of occupancy until death by the senior citizen homeowner. The second is the reversionary interest held by the investor, meaning that the investor acquires full equity in the property upon the death of the seller. A split equity arrangement could be combined with a life annuity purchase, allowing for gradual dissaving from home equity by senior citizen homeowners. Senior homeowners would receive a quaranteed monthly income for life, in addition to the right to lifetime occupancy of their house.

<u>Self-contained Accommodation</u>

 private dwelling units in the form of detached homes, apartment, rowhouse etc. providing very little service to homes.

Service flats/centres

 a form of congregate housing with communal services, private bedroom, and some degree of nursing care available. It is often designed for the handicapped elderly.



